

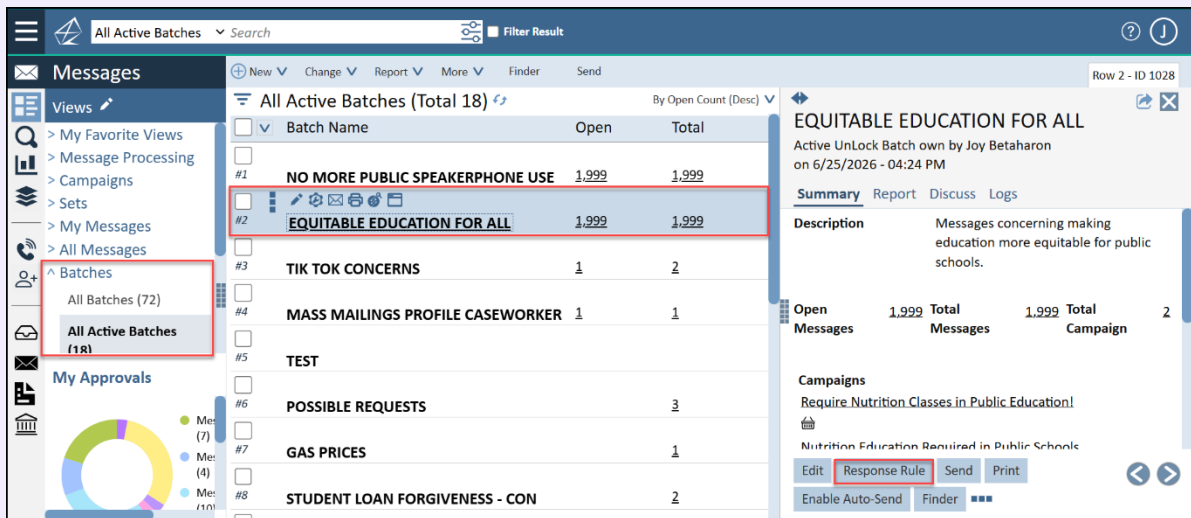
Creating Batch/Auto Send Rules

Market: House, Senate

Description: These instructions teach users how to create **Batch/Auto Send Rules** which automatically add settings to messages placed in the Batch, such as an Issue code(s), Assigned Staffer, and Form Letter response. IQ then sends the Letter on the set scheduled of your choice when the Auto Send rule is created.

Create a Batch Rule from Batches

1. Navigate to the **Messages** application.
2. Click on the **Batches View**.
3. Select **Response Rule** in-row action for the Batch you'd like to add a rule to.



The screenshot shows the 'Messages' application interface. On the left, a sidebar contains navigation options like 'Views', 'My Favorite Views', 'Message Processing', 'Campaigns', 'Sets', 'My Messages', 'All Messages', 'Batches', 'My Approvals', and a 'My Approvals' chart. The 'Batches' section is expanded, showing 'All Batches (72)' and 'All Active Batches (18)'. The main area displays a table of 'All Active Batches (Total 18)'. The table has columns for 'Batch Name', 'Open', and 'Total'. The batch 'EQUITABLE EDUCATION FOR ALL' is highlighted. To the right of the table, a detailed view for the selected batch is shown, including a 'Description', 'Summary', 'Report', 'Discuss', and 'Logs' tab. The 'Response Rule' button is highlighted in the bottom right corner of the batch details panel.

Batch Name	Open	Total
#1 NO MORE PUBLIC SPEAKERPHONE USE	1,999	1,999
#2 EQUITABLE EDUCATION FOR ALL	1,999	1,999
#3 TIK TOK CONCERNS	1	2
#4 MASS MAILINGS PROFILE CASEWORKER	1	1
#5 TEST		
#6 POSSIBLE REQUESTS		3
#7 GAS PRICES	1	
#8 STUDENT LOAN FORGIVENESS - CON	2	

EQUITABLE EDUCATION FOR ALL
Active UnLock Batch own by Joy Betaharon on 6/25/2026 - 04:24 PM

Description Messages concerning making education more equitable for public schools.

Summary Report Discuss Logs

Open Messages 1,999 **Total Messages** 1,999 **Total Campaign** 2

Campaigns Require Nutrition Classes in Public Education! Nutrition Education Required in Public Schools

Response Rule Edit Send Print

4. Add your rules in the Edit Batch Response dialog. The **Best Practice** is to include at least **one issue code**, a **staffer in Assigned To** and a **selected Form Letter** (assuming one has been created already. If not, check the box **Create New Letter**).

Edit Batch Response

Batch
EQUITABLE EDUCATION FOR ALL

Comments

☐ Add to existing ☐ Update if empty ☐ Remove existing

EDU - Education X

Issues

Affiliations

Bill

☐ Supports ☐ Opposes ☒ No Position

Assigned To
Joy Betaharon X ▾ ☐ Include History

Letter Name
EQUITABLE EDUCATION FOR ALL (RA) X ▾

☐ Create New Letter

Remove Rules ID#1028 Row 2 Save Close

5. Click **Save**.

Create a Batch Rule from Campaigns/Bills/Individual Messages

1. Navigate to the **Messages** application.
2. Click on **Message Processing**.
3. Select the **Batch** action for the **Campaign** or **Bill** you'd like to batch.

Messages

Views: My Favorite Views, Message Processing, Possible Requests (7), Campaigns Without Rule (34), Bills Without Rule (12), Individual Unprocessed Messages (905), All Open Unbatched (n/a), Form Letters By...

Campaigns Without Rule (Total 34)

Campaign Name	Created Latest	Open	No Batch	Total	Rule
#1 The Price of Eggs is Outrageous!!	2/6/2025 2/6/2025	2000	2000	2000	No
#2 Home Ownership is out of reach for too many	8/23/2023 8/23/2023	2000	2000	2000	No
#3 Equitable Education Opportunities for American Students	7/9/2024 7/9/2024	2000	2000	2000	No
#4 Require Nutrition Classes in Public Education!	4/14/2023 4/14/2023	1999	1999	1999	HEALTHY NUTRITION IN SCHOOLS
#5 Is climate change causing wildfires?	8/23/2023 8/23/2023	1999	1999	1999	No
#6 Earth Act to Stop Climate Pollution by 2030	7/9/2024 7/9/2024	1000	1000	1000	No

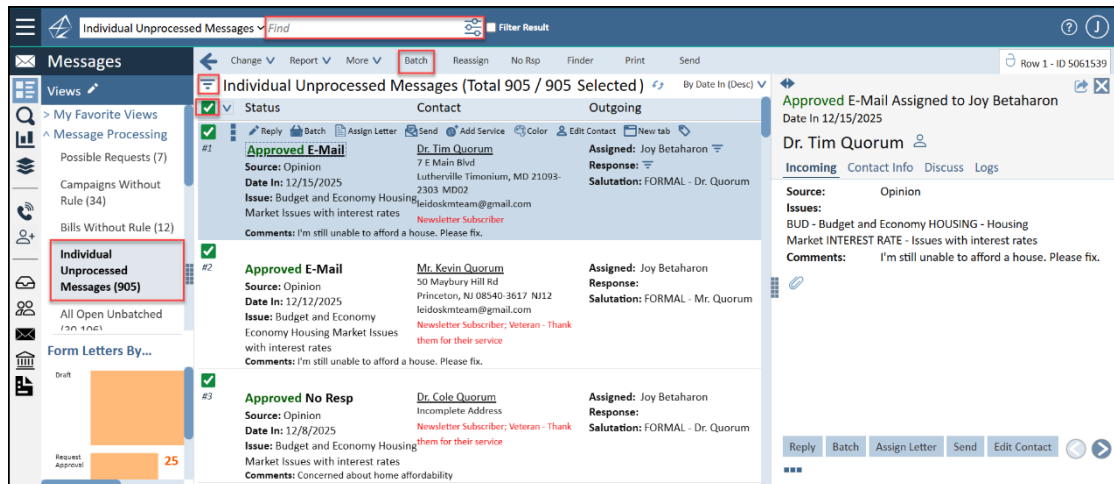
The Price of Eggs is Outrageous!!
Created 2/6/2025

Summary Variations Analysis Discuss Logs

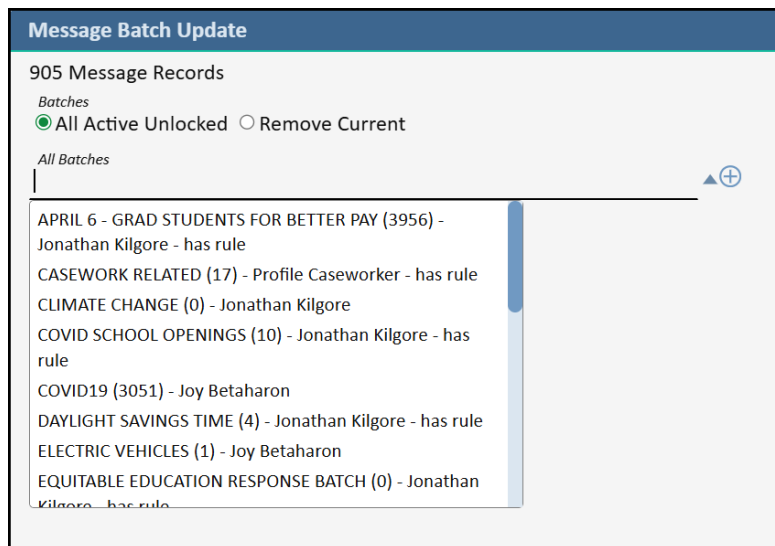
Unbatched Count 2000
Total Count 2000
Assigned User No Assigned User
Assigned Issue No Assigned Issue
Variations 1
Response Rules
Auto-Send Rules
Batches Unbatched(2000)
Open Count 2000
Responses
Sample Subject The Price of Eggs is Outrageous!!

Assign Batch Send

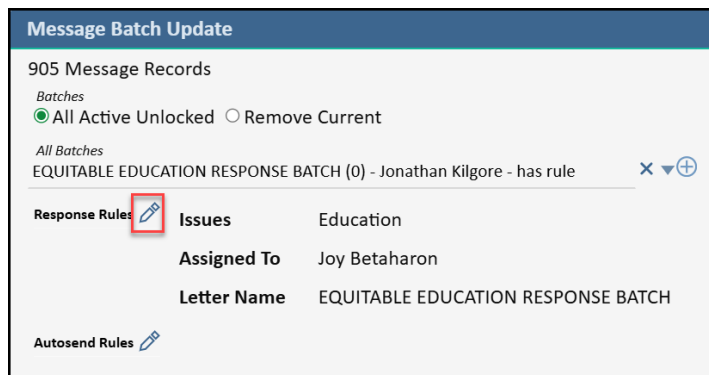
4. For **Individual Unprocessed Messages**, select the messages you would like to Batch (utilize **Filters** and **Searching** to help narrow your selection), then click the **Batch** menu action.



5. Select an existing Batch from the dropdown or click on the “+” icon to create a new one.



6. Review or create the Batch Response rules as in step 4 above by clicking the Pencil icon.



7. Click **Update**.

8. Note that the next time you come to the Batching screen, you will see a list of **Recently Used Batches**, allowing for faster Batching for Messages of the same topic in the future.

Create an Auto Send Rule

Auto Send Rules allow a Batch to automatically reply to Open Messages within it on a set schedule of your choice. You can create/edit the Auto Send Rule from the Batching screen (as seen above) or by navigating to the Batch view within the Messages application and following these steps:

1. Click on a Batch that has a Response Rule.
2. Select the **Enable Auto Send** in-row action.

The screenshot shows the 'All Active Batches' screen. The left sidebar has a 'Messages' section with 'Batches' expanded. The 'Batches' list includes 'LOCAL ECONOMY ISSUES' with 1 open message and 3,007 total messages. The right pane shows details for 'LOCAL ECONOMY ISSUES', including 'Open Messages 1' and 'Total Messages 3,007'. At the bottom of the right pane, the 'Enable Auto-Send' button is highlighted.

3. Add your Auto Send Rules.
4. Click Start Auto-Send button.

The screenshot shows the 'Set Up Batch Auto-Send' dialog box. The dialog is titled 'Set Up Batch Auto-Send' and contains the following text: 'Automatically approve and email all unrestricted open messages in this batch that have an approved version of the letter... LOCAL ECONOMY ISSUES 8923'. Below this, there are checkboxes for 'Send on these days' (Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday). The 'Tuesday' through 'Friday' checkboxes are checked. Below the checkboxes, there is a field for 'Start Sending these messages at' set to '08:00 AM'. Below that, there is a field for 'Messages must be at least' set to '48' hours old before they are eligible for auto-sending. Below that, there is a field for 'Stop automatically sending messages on' set to '11/15/2023'. At the bottom right, there are 'Start Auto-Send' and 'Cancel' buttons.

Note: The “Messages must be at least X hours old” field will tell IQ how old an incoming message must be (how many hours it has been in your IQ system) before your letter will send as a response. This helps ensure a timely response.